

Adding - Linking & Journaling Outlook contacts & emails into WorkCenter

In this flash video, we will demonstrate how to take your incoming emails in your Outlook and perform the following;

1. Create a contact record
2. Link the email to your new contact record inside your contact “Journal Tab”

When you downloaded and installed WorkCenter on your computer, you automatically created a WorkCenter Button on your Outlook main screen. This button is typically located at the top right corner of your Outlook main screen.

Step #1: Create a contact record from an incoming email: Select the incoming email that you wish to have a contact record created by a single mouse click on that email. You will notice the email line is highlighted.

Step #2: Once the email is highlighted, click the down arrow at the right side of your WorkCenter Button in Outlook and select: “Add to Contact”. When this is selected, WorkCenter will automatically create a contact record from that email sender.

Step #3: Linking that email to your “Journal Tab” inside your contact record: If this is an important email that you wish to add to the journal tab for your contact, click the down arrow one more time. This time select “Add to Journal”. You have now added this email and created a link between Outlook and WorkCenter regarding this email and contact record.

Step #4: Test your results: Go to WorkCenter and open the contact record by double clicking on the contact name. Once the contact record is opened, click on the “Journal Tab” located at the top of the screen. You will notice the email has been added to the journal. You can double click on the email icon and WorkCenter will open the email in your Outlook.